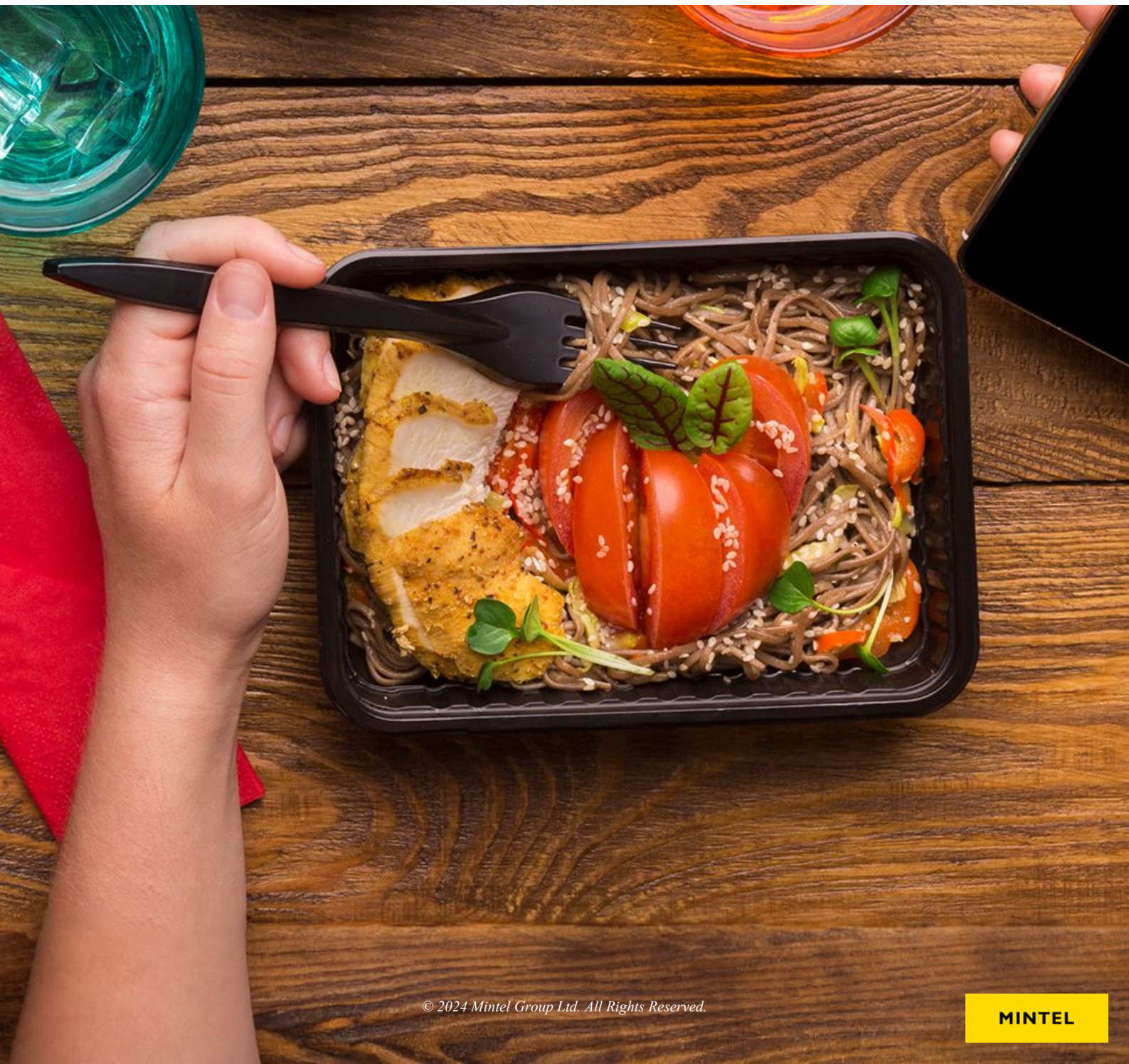


A YEAR OF INNOVATION IN PREPARED MEALS & MEAL KITS, 2023

Vegan and plant-based claims are rising among launches in Europe, as frozen formats surge in Asia and more meat and poultry flavours arrive in North America.



Mikolaj Kaczorowski,
Innovation Analyst



Report Content



- What we have seen
- Our pick of the most innovative launches in this review
- Other innovative launches
- The Future of Meals, Pizza and Soup

EUROPE, MIDDLE EAST & AFRICA (EMEA)

Europe: sustainability claims continue to rise among prepared meals and meal kit launches

- Consumers seek planet-friendly packaging
- Prepared meals and meal kit brands focus on more sustainable packaging
 - Graph 1: prepared meals and meal kits launches, by share of ethical and environmental claims, 2018-23
- Brands are reducing packaging content and innovating with edible, compostable and recyclable materials

Europe: brands respond to consumer interest in plant-based options

- Consumers are looking to reduce their meat consumption
- Vegetarian claims see a resurgence, while vegan and plant-based claims continue to grow
 - Graph 2: prepared meals and meal kits launches, by share of select claims, 2018-23
- Prepared meal brands offer vegan and vegetarian versions of popular meal favourites
- Brand renovation/innovation: Heinz launches Beanz Bowls, frozen prepared meals suitable for vegans

The Middle East & Africa (MEA)

- Prepared meal brands offer consumers a diversity of preparation methods

ASIA PACIFIC (APAC)

Asia: prepared meals and meal kit brands grow their portfolio of frozen options

- Consumers like to stock up on frozen-prepared meals
- Frozen meals increase launch share while chilled options decline
 - Graph 3: prepared meals and meal kits launches, by storage, 2018-23
- Frozen prepared meals appeal as convenient, long life meal options
- Brand renovation/innovation: Johncook Deli Meats launches a plant-based, high protein prepared meal

Asia: prepared meals and meal kit producers embrace co-branding tactics and product tie-ins

- Consumers will pay more for prepared meals with premium ingredients
- The share of prepared meals and meal kit launches featuring a co-branded claim remains niche, though is growing
 - Graph 4: prepared meals and meal kit launches, by share of co-branded claim, 2018-23

A year of innovation in prepared meals & meal kits, 2023

- Co-branded prepared meal launches

Australia & New Zealand

- Social media claims are booming
- Brand renovation/innovation: Rosella enters the meal kit market

THE AMERICAS

North America: prepared meal brands are meeting consumers' preference for meat-based recipes

- Animal proteins are a dietary staple for most
- Animal proteins see a resurgence in prepared meals
 - Graph 5: prepared meals and meal kits launches, by flavour component sub-group, 2018-23
- Meat takes centre stage in these prepared meals

North America: brands are doubling down on frozen prepared meals and meal kit innovation

- Frozen meals have grown in popularity in part due to the growth of home working
- Private labels are muscling in on the growing frozen prepared meals and meal kits market
 - Graph 6: frozen prepared meals and meal kits launches, by private label share, 2018-23
- Frozen prepared meals and meal kit launches appeal to the diversity of dietary and flavour preferences
- Brand renovation/innovation: Kraft Heinz launches easy to prepare and customisable prepared meal options

Latin America

- Brands celebrate local ingredients and regional flavours

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